



APPLICATION FOR RECORDS RETENTION SCHEDULE

OFFICE OF THE SECRETARY OF STATE
DEPARTMENT OF ARCHIVES AND HISTORY
RECORDS MANAGEMENT DIVISION

INSTRUCTIONS: See Publication No. 76-RM-1 for instructions on completing this form. Forward signed original to Department of Archives and History, Records Management Division, 330 Capitol Avenue, Atlanta, Georgia, 30334, Attention: Scheduling Section.

FOR AGENCY USE		FOR RECORDS MANAGEMENT USE	
Application Date	1. Agency Address Department of Education Office of Vocational Education Division of Vocational Instruction Business Education Unit 1752 East Tower; Floyd Building	Application Number 81-168-A	
Application Number		Date Received MAY 10 1983	Date Completed JUN 7 1983
2. Person to Contact Deborah Collins		Working Title Senior Secretary	Telephone Number 656-2562
3. Action Requested a. <input type="checkbox"/> Establish Retention Schedule; record will continue to accumulate. b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated. c. <input checked="" type="checkbox"/> Amend Application No. <u>81-168-A</u> Check One: <input checked="" type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void			
4. Dates of Series Earliest Latest		5. Records Series Title (followed by title used in office, if different) BUSINESS EDUCATION SCHOOL FILES	
6. Division and Office Function		What is the function of the Division and the Office in which this record series is created? <u>No Change</u>	
7. Record Series Description		This file contains the following documents (include form numbers and titles, if any): Attach samples of the file. Documents relating to: Included are: <u>No Change</u> File is arranged:	
8. Monthly Reference Rate		How often are records referred to which are: One to six months old <u>2</u> ; Seven to twelve months old <u>1</u> ; Thirteen to twenty-four months old <u>0-1</u> ; twenty-five months and older <u>0-1</u> ?	
9. Annual Rate of Accumulation of Records		Letter-size drawers _____; Legal-size drawers _____; Shelves _____; Other (specify) <u>4 1/2 cu. ft.</u>	

YES	NO	10. Questionnaire (Place an "X" in the proper column)
		a. Is this the official copy of the series? If not, where is it?
		b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation.
		c. Is this a vital record?
		d. Does this series have historical or long term research value?
		e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately?
		f. Is the information contained in this series ever published? If yes, attach copy.
		g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy.
		h. Is there a duplication of this series in your office, or in another office or agency? If yes, where?
		i. Is this series (or a major portion of it) regularly microfilmed?
		j. Does the record series result in a computer printout?

11. Retention Requirements

The following requires the series to be kept:

- | | | | |
|--------------------------|--------------|-----------------------------------|--------------|
| a. State Law | _____ years. | d. Audit period | _____ years. |
| b. Statute of limitation | _____ years. | e. Administrative need | _____ years. |
| c. Federal law | _____ years. | f. Federal retention instructions | _____ years. |

Attach copy or excerpt of laws or regulations. Explain administrative need.

12. Approved Disposition Instructions

This agency recommends that the file series be cut off at the end of each:

☐ Calendar Year; ☒ Fiscal Year; ☐ Other _____ then,

- ☐ Hold in the current files area _____ month(s) _____ year(s); then
- ☐ Transfer to local holding area; hold _____ year(s); then
- ☒ Transfer to State Records Center; hold 3 year(s); then
- ☒ Destroy.
- ☐ Transfer to State Archives for permanent retention.
- ☐ Other (Specify)

These instructions apply to all prior and future accumulations of the series.

Agency Head/Designee (Signature)	Date	Records Management Officer (Signature)	Date
<i>A. Weyman Culp</i>	<i>5/9/83</i>	<i>Walker L. Baumgardner</i>	<i>5/9/83</i>

State Records Committee (Signature)		Date
State Auditor/Designee	<i>James L. Smith</i>	<i>1-6-83</i>
Secretary of State/Designee	<i>Edward Weldon</i>	<i>6/2/83</i>
Attorney General/Designee	<i>Berry Stapp</i>	<i>6-8-83</i>

Recommendations in paragraph 12 are approved.
(If disapproved, attach letter of explanation.)



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Application Number		Date Received JAN 27 1982	Date Completed FEB 8 1982
2. Person to Contact Deborah Collins		Working Title Senior Secretary	Telephone Number 656-2562
3. Action Requested a. <input type="checkbox"/> Establish Retention Schedule; record will continue to accumulate. b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated. c. <input checked="" type="checkbox"/> Amend Application No. <u>81-168-A</u> Check One: <input type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void			
4. Dates of Series Earliest _____ Latest _____		5. Records Series Title (followed by title used in office, if different) BUSINESS EDUCATION SCHOOL FILES	
6. Division and Office Function		What is the function of the Division and the Office in which this record series is created? <u>No Change</u>	
7. Record Series Description Documents relating to: Included are: <u>No Changes</u> File is arranged:		This file contains the following documents (include form numbers and titles, if any): Attach samples of the file.	
8. Monthly Reference Rate		How often are records referred to which are: One to six months old _____; Seven to twelve months old _____; Thirteen to twenty-four months old _____; twenty-five months and older _____?	
9. Annual Rate of Accumulation of Records Letter-size drawers _____; Legal-size drawers _____; Shelves _____; Other (specify) _____			

YES	NO	10. Questionnaire (Place an "X" in the proper column)
		a. Is this the official copy of the series? If not, where is it? <u>1</u>
		b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation.
		c. Is this a vital record?
		d. Does this series have historical or long term research value?
		e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately?
		f. Is the information contained in this series ever published? If yes, attach copy.
		g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy.
		h. Is there a duplication of this series in your office, or in another office or agency? If yes, where?
		i. Is this series (or a major portion of it) regularly microfilmed?
		j. Does the record series result in a computer printout?

11. Retention Requirements

↑ The following requires the series to be kept:

- | | | | |
|--------------------------|-----------------|-----------------------------------|-----------------|
| a. State Law | _____ years. | d. Audit period | _____ years. |
| b. Statute of limitation | _____ years. | e. Administrative need | <u>3</u> years. |
| c. Federal law | <u>3</u> years. | f. Federal retention instructions | EEO 3 years. |

Attach copy or excerpt of laws or regulations. Explain administrative need.

12. Approved Disposition Instructions

This agency recommends that the file series be cut off at the end of each:

☐ Calendar Year; ☒ Fiscal Year; ☐ Other _____ then,

- ☒ Hold in the current files area _____ month(s) 1 year(s); then
- ☐ Transfer to local holding area; hold _____ year(s); then
- ☒ Transfer to State Records Center; hold 2 year(s); then
- ☒ Destroy.
- ☐ Transfer to State Archives for permanent retention.
- ☐ Other (Specify)

These instructions apply to all prior and future accumulations of the series.

Agency Head/Designee (Signature)	Date	Records Management Officer (Signature)	Date
<u>H. Weyman Culp</u>	<u>1/25/82</u>	<u>Walker L. Baumgardner</u>	<u>1-25-82</u>
		State Records Committee (Signature)	Date
Recommendations in paragraph 12 are approved. (If disapproved, attach letter of explanation.)		State Auditor/Designee	<u>2-5-82</u>
		Secretary of State/Designee	<u>2-2-82</u>
		Attorney General/Designee	<u>2-2-82</u>



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FOR AGENCY USE		FOR RECORDS MANAGEMENT USE	
Application Date	1. Agency Address Department of Education Office of Vocational Education Division of Vocational Instruction Business Education Unit Atlanta, GA 30334	Application Number	81-168-A
Application Number		Date Received	Date Completed
		OCT 26 1981	NOV 4 1981
2. Person to Contact Russell Mercer		Working Title State Supervisor	Telephone Number 656-2552
3. Action Requested a. <input type="checkbox"/> Establish Retention Schedule; record will continue to accumulate. b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated. c. <input checked="" type="checkbox"/> Amend Application No. 81-168 Check One: <input checked="" type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void			
4. Dates of Series Earliest Latest 1977 to date		5. Records Series Title (followed by title used in office, if different) Business Education School Files	
6. Division and Office Function What is the function of the Division and the Office in which this record series is created? No Change			
7. Record Series Description This file contains the following documents (include form numbers and titles, if any): Attach samples of the file. Documents relating to: Included are: No Changes File is arranged:			
8. Monthly Reference Rate How often are records referred to which are: One to six months old _____; Seven to twelve months old _____; Thirteen to twenty-four months old _____; twenty-five months and older _____?			
9. Annual Rate of Accumulation of Records Letter-size drawers _____; Legal-size drawers _____; Shelves _____; Other (specify) _____			

YES	NO	10. Questionnaire (Place an "X" in the proper column)
X		a. Is this the official copy of the series? If not, where is it?
	X	b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation.
	X	c. Is this a vital record?
	X	d. Does this series have historical or long term research value?
	X	e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately?
	X	f. Is the information contained in this series ever published? If yes, attach copy.
	X	g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy.
	X	h. Is there a duplication of this series in your office, or in another office or agency? If yes, where?
	X	i. Is this series (or a major portion of it) regularly microfilmed?
	X	j. Does the record series result in a computer printout?

11. Retention Requirements

↑ The following requires the series to be kept:

a. State Law	_____ years.	d. Audit period	_____ years.
b. Statute of limitation	_____ years.	e. Administrative need	3 _____ years.
c. Federal law	_____ years.	f. Federal retention instructions	EEO 3 _____ years.

Attach copy or excerpt of laws or regulations. Explain administrative need.

EEO requires three (3) years retention of all material used in hiring, firing, pay raises, etc.

12. Approved Disposition Instructions

This agency recommends that the file series be cut off at the end of each:

☐ Calendar Year; ☒ Fiscal Year; ☐ Other _____ then,

- ☒ Hold in the current files area _____ month(s) 2 _____ year(s); then
- ☐ Transfer to local holding area; hold _____ year(s); then
- ☒ Transfer to State Records Center; hold 1 _____ year(s); then
- ☒ Destroy.
- ☐ Transfer to State Archives for permanent retention.
- ☐ Other (Specify)

These instructions apply to all prior and future accumulations of the series.

Agency Head/Designee (Signature)	Date	Records Management Officer (Signature)	Date
<i>A. Wayman Culp</i>	10/22/81	<i>Walker L. Baumgardner</i>	10/22/81
Recommendations in paragraph 12 are approved. (If disapproved, attach letter of explanation.)		State Records Committee (Signature)	Date
		<i>James L. ...</i>	11-2-81
		Secretary of State/Designee	
		<i>Carroll Hart</i>	11-2-81
		Attorney General/Designee	
		<i>...</i>	11-3-81



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Application Date	1. Agency Address Department of Education Office of Vocational Education Division of Vocational Instruction Business Education Unit Atlanta, Georgia	Application Number 81-168	
Application Number		Date Received MAR 2 1981	Date Completed MAR 11 1981
2. Person to Contact Russell Mercer		Working Title State Supervisor	Telephone Number 656-2552
3. Action Requested a. <input checked="" type="checkbox"/> Establish Retention Schedule; record will continue to accumulate. b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated. c. <input type="checkbox"/> Amend Application No. _____ Check One: <input type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void			
4. Dates of Series Earliest Latest 1977 to date		5. Records Series Title (followed by title used in office, if different) Business Education School Files	
6. Division and Office Function What is the function of the Division and the Office in which this record series is created? The Division of Vocational Instruction is responsible for developing policy relating to vocational instruction at the secondary and postsecondary level; participating in the development of the State Plan for Vocational Education; developing vocational education program standards relating to instructional areas; providing consultative services to local school systems involving all phases of the instructional process; participating on evaluation of local school systems' vocational programs; reviewing architectural plans for local school systems' vocational facilities; reviewing request from local systems for the purchase of equipment; reviewing vocational education instructional materials; reviewing preservice and in-service training programs; and supervising vocational student organizations at the state level.			
7. Record Series Description This file contains the following documents (include form numbers and titles, if any): Attach samples of the file. Documents relating to: monitoring the activities of the Business Education program at the secondary and postsecondary level in Georgia. Included are: Program of Work; Secondary Vocational Education Report (DE Form 0537); and related correspondence. File is arranged: chronologically by fiscal year, thereunder by academic area, thereunder alphabetically by school system thereunder alphabetically by teachers name			
8. Monthly Reference Rate How often are records referred to which are: One to six months old <u>100</u> ; Seven to twelve months old <u>100</u> ; Thirteen to twenty-four months old <u>25</u> ; twenty-five months and older <u>10</u> ?			
9. Annual Rate of Accumulation of Records Letter-size drawers <u>2 1/2</u> ; Legal-size drawers _____; Shelves _____; Other (specify) _____			

YES	NO	10. Questionnaire (Place an "X" in the proper column)
X		a. Is this the official copy of the series? If not, where is it?
	X	b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation.
	X	c. Is this a vital record?
	X	d. Does this series have historical or long term research value?
	X	e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately?
	X	f. Is the information contained in this series ever published? If yes, attach copy.
	X	g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy.
	X	h. Is there a duplication of this series in your office, or in another office or agency? If yes, where?
	X	i. Is this series (or a major portion of it) regularly microfilmed?
	X	j. Does the record series result in a computer printout?

11. Retention Requirements

The following requires the series to be kept:

- | | | | |
|--------------------------|--------------|-----------------------------------|--------------|
| a. State Law | _____ years. | d. Audit period | _____ years. |
| b. Statute of limitation | _____ years. | e. Administrative need | 3 years. |
| c. Federal law | _____ years. | f. Federal retention instructions | EEO 3 years. |

Attach copy or excerpt of laws or regulations. Explain administrative need.

EEO requires three (3) years retention of all material used in hiring, firing, pay raises, etc.

12. Approved Disposition Instructions

This agency recommends that the file series be cut off at the end of each:

☐ Calendar Year; ☒ Fiscal Year; ☐ Other _____ then,

- ☒ Hold in the current files area _____ month(s) 3 year(s); then
- ☐ Transfer to local holding area; hold _____ year(s); then
- ☐ Transfer to State Records Center; hold _____ year(s); then
- ☒ Destroy.
- ☐ Transfer to State Archives for permanent retention.
- ☐ Other (Specify)

These instructions apply to all prior and future accumulations of the series.

Agency Head/Designee (Signature)	Date	Records Management Officer (Signature)	Date
RM D. A. Lariscy	3-2-81	Walker L. Baumgardner	3-2-81
Recommendations in paragraph 12 are approved. (If disapproved, attach letter of explanation.)		State Records Committee (Signature)	Date
		State Auditor/Designee	3-11-81
		Secretary of State/Designee	3-10-81
		Attorney General/Designee	3-11-81

RETENTION SCHEDULES TRANSFERRED FROM DEPT. OF EDUCATION (0414)
TO THE DEPT. OF TECHNICAL AND ADULT EDUCATION;
ON NOTIFICATION OF RUBY C. SHERRILL, DTAE (SEE ATTACHED LETTER & NAMES ENTRY)

0415-000

81-0014 M Vocational Organizations Affiliation Files
C 960425 SA C
4/25/96 Tran. from 0414(DOE) to 0415(DTAE)

CO = CY

Review folder and destroy all material 3 years or older
Note* Earlier Destruction authorized

0415-000

81-0015 M Vocational Organization General Administrative Files
C 960425 SA C
4/25/96 Tran. from 0414(DOE) to 0415(DTAE)

CO = FY

Hold in CFA 1 year
Transfer to Archives
For continuing retention

0415-000

81-0016 M Vocational Organization Financial Files
C 960425 SA C
4/25/96 Tran. from 0414(DOE) to 0415(DTAE)

CO = FY

Hold in CFA 1 year
Transfer to SRC
Hold 4 years
Destroy

0415-000

81-0043 M Related Coordinators
C 960425 SA I
4/25/96 Tran. from 0414(DOE) to 0415(DTAE)

0415-000

81-0168 M Business Education School
C 960425 SA I
4/25/96 Tran. from 0414(DOE) to 0415(DTAE)

RETENTION SCHEDULES TRANSFERRED FROM DEPT. OF EDUCATION (0414)
TO THE DEPT. OF TECHNICAL AND ADULT EDUCATION;
ON NOTIFICATION OF RUBY C. SHERRILL, DTAE (SEE ATTACHED LETTER & NAMES ENTRY)

0415-000

81-0255 M Administrative Subject
C 960425 SA I
4/25/96 Tran. from 0414(DOE) to 0415(DTAE)

CO = FY
Hold in CFA 1 year
Transfer to SRC
Hold 2 years
Destroy

0415-000

81-0256 M School System
C 960425 SA I
4/25/96 Tran. from 0414(DOE) to 0415(DTAE)

CO = FY
Hold in CFA 1 year
Transfer to SRC
Hold 2 years
Destroy

0415-000

81-0325 M Trade and Industrial Education School System File
C 960425 SA I
4/25/96 Tran. from 0414(DOE) to 0415(DTAE)

0415-000

89-0026 M JTPA Unit Administrative Files
C 960425 SA I
4/25/96 Trans. from 04140(DOE) to 0415(DTAE)

0415-000

89-0027 M SDA Cooperative Agreement/RFP(Request for Proposal) Files
C 960425 SA I
4/25/96 Trans. from 0414(DOE) to 0415(DTAE)

0415-000

89-0028 M JTPA Section 123 Activity Files
C 960425 SA I
4/25/96 Trans. from 0414(DOE) to 0415(DTAE)

Entered by: Charles D. Balm Jr Approved by: [Signature]

Date: Nov. 18, 1996

Nov. 18, 1996
C:\A1\SCH\APPROVED\0415-96.sch



Secretary of State
Department of Archives and History
330 Capitol Avenue, S.E.
Atlanta, Georgia 30334

Lewis A. Massey
SECRETARY OF STATE
(404) 656-2881

Edward Meldon
DIRECTOR
(404) 656-2358
INFORMATION (404) 656-2393
FAX (404) 657-8427

April 25, 1996

Ruby C. Sherrill
Office of Technical Education
Department of Technical and Adult Education
1800 Century Place, Suite 400
Atlanta, GA 30345-4304

Dear Ms. Sherrill:

Thanks for the JTPA information you shared with me this morning.

Enclosed are copies of the JTPA retention schedules from Department of Education:

Schedule #89-026 - JTPA Unit Administrative Files, 1983 and [ongoing];
Schedule #89-027 - SDA Cooperative Agreement RFP Files, 1983 and [ongoing].
Schedule #89-028 - JTPA Section 123 Activity Files, 1983 and [ongoing].

We will update our records to transfer these to the jurisdiction of the Department of Technical and Adult Education. We will also begin a review to see if there are other records series that should be transferred from Education to DT&AE.

We will begin development of a common retention schedule for the local school systems' JTPA records when we receive the Department of Labor manual. We probably will be calling you again for clarification and additional information.

Again, thanks. Call us if we can be of assistance.

Sincerely,

Peter E. Schinkel
Head, Schedule Section
404 656-2373 FAX 404 656-2949
<petes@archives.sos.state.ga.us>

Enclosures

cc: Andrew S. Taylor, Assistant Director

C:\A1\0415-96.LTR

LNAME Sherrill
SALUT Ms.
TITLE

FNAME MI Ruby C.
AUTH RA
RECNO 2207

PHNO 404 679-1678 EXT
FAXNO 404 679-1675 EMAIL
CONFID

ORG

AGENPREFIX Department of
AGENDESC Technical and Adult Education
DIVISION Office of Technical Education
PO_BLDG 1800 Century Place, Suite 400
STREET
CITY Atlanta
ZIP 30345-4304
COUNTY Fulton

ACRONYM DTAE
AGCODE 0415
DIVCODE

STATE GA
DELIVERY M
INST SA

TRANDATE 04/25/96

INIT PES

NOTE 4-25-96: She coordinates JTPA for local schools. She will send us the GDoL Manual which sets 3 year after grant period requirement. She thinks a common for local schools is a good idea.

Told her we would transfer 89-026,027,028 to DTAE; would do same for any others if we knew which they were.